

# Application Development Environment (ADE)

## **Design Phase**

### Phase Completion Procedure *Quick-Start*

Information Systems Division  
California Department of Motor Vehicles

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**TITLE:** Phase Completion Procedure  
**PROCEDURE NUMBER:** ADE 22.0 (Design)  
**OWNER:** Strategic Planning and Control Branch  
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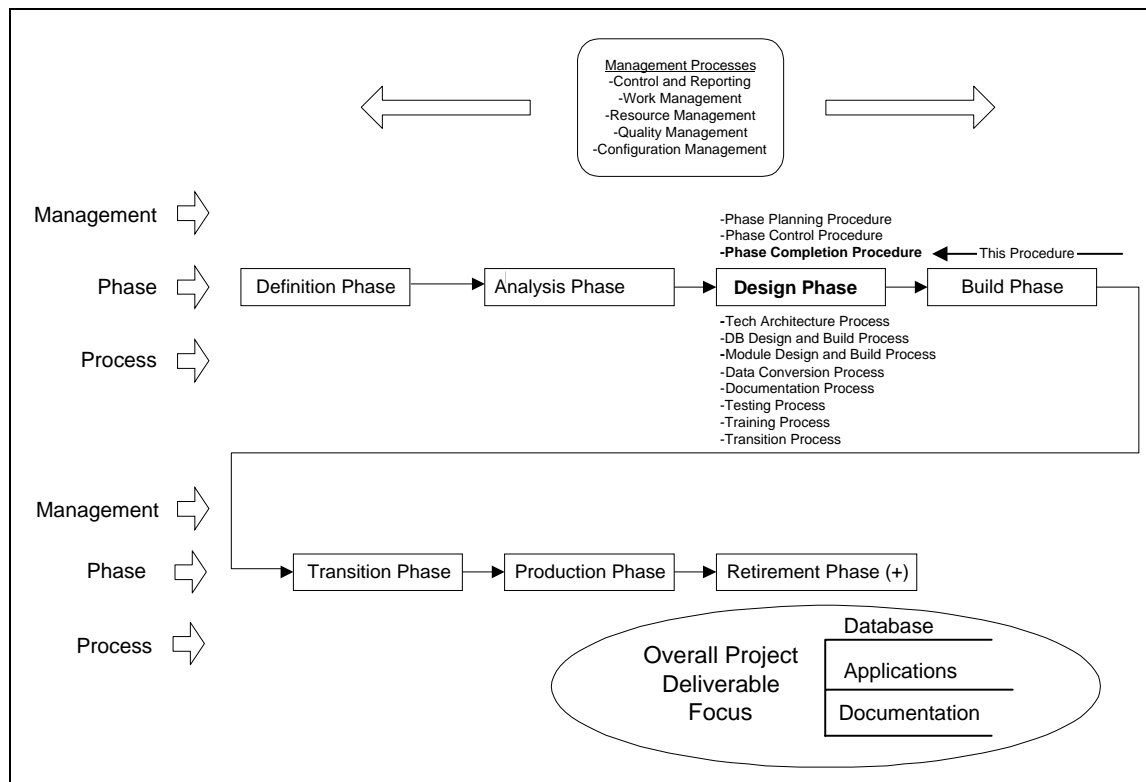
### Principal Objectives of the Phase Completion Procedure

In the Design Phase, the objectives of Phase Completion are to:

- Verify that deliverables produced during the phase meet project quality and completeness standards.
- Secure client acceptance of deliverables produced during the phase.
- Release staff and physical resources no longer required.

### Overview

The graphic below depicts this Project Management (PJM) procedure, Phase Completion, as it occurs within the current CDM phase, the Design Phase.



### Phase Completion Tasks and Deliverables

Each of the five Phase Completion tasks listed below results in a specific deliverable. Tasks are identified with their PJM ID# , the first two letters of which correspond to the Management Processes shown at the top of the preceding graphic. Three are considered by Oracle to be key (★ = key deliverable).

***Note:** Remember the caution offered in the Project Planning Procedure (Definition Phase) to be mindful of the distinction between phase and process deliverables.*

The abbreviated references provided in the right-hand column refer to the Oracle PJM manuals to which you will want to refer for background or greater detail:

- *The Project Method Handbook (PJM-MH)*
- *The Project Management Process and Task Reference (PJM-PTR)*
- *The Process Management Deliverable Reference (PJM-DR)*

Task	Description	Deliverable	Comments & Reference
★Secure Client Acceptance CR.080	Obtain sign-off on Design Phase deliverables to the mutual satisfaction of consultant and client. (See list of Design Phase deliverables following this table.) <i>To preclude last-minute delays, review acceptance procedure in advance with client project members participating in sign-off. If necessary, hold issue resolution session(s) prior to beginning phase completion.</i>	Phase Acceptance	<i>PJM-MH, Chapter 6</i> <i>PJM-PTR, pp. 1-43 to 1-46</i> <i>PJM-DR, pp. 1-32 to 1-35, and App. A</i>  <i>Oracle MS Templates:</i> <ul style="list-style-type: none"> <li>• <i>End Report</i></li> <li>• <i>Acceptance Certificate</i></li> </ul>
Release Staff RM.080	Release staff and physical resources not required for further project work. <i>The release of staff and physical resources assumes you have available to you the Staffing and Organization Plan and Physical Resource Plan for the next phase. Normally this is true, since planning for the next phase should be complete when this task is performed.</i>	Released Staff	<i>PJM-MH, Chapter 6</i> <i>PJM-PTR, pp. 3-37 to 3-40</i> <i>PJM-DR, pp. 3-18 and App. A</i>
Release Physical Resources RM.090	This task involves releasing control of those physical resources that are no longer needed to complete the project execution. <i>Identify resources to be released, coordinate release with suppliers, and turn over resources.</i>	Released Physical Resources	<i>PJM-MH, Chapter 6</i> <i>PJM-PTR, pp. 3-41 to 3-43</i> <i>PJM-DR, p. 3-19 and App. A</i>

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Task	Description	Deliverable	Comments & Reference
✦Perform Quality Assessment QM.050	<p>Conduct an assessment of the completeness of Quality Control arrangements (reviews, audits, tests, and problem resolution) to assess the completion of the project to date. The Quality Report provides an opportunity to demonstrate to the client the completeness of your quality control measures during the phase.</p> <p><i>This quality assessment may be conducted by a member of the project team (who may hold other quality responsibilities) or may be carried out by a quality consultant external to the project team.</i></p> <p><i>SP/CB has SQA procedures for the Project Managers; these defined procedures can assist the project manager.</i></p>	Quality Report	<p><i>PJM-MH, Chapter 6</i> <i>PJM-PTR, pp. 4-25 to 4-27</i> <i>PJM-DR, pp. 4-18 to 4-19 and App. A</i></p> <p><i>Oracle MS Template:</i></p> <ul style="list-style-type: none"><li>• <i>Quality Report</i></li></ul>
✦Audit Key Deliverables CM.060	<p>In this task you demonstrate to the project manager and the client that the deliverables produced were those which were intended, and that adequate control over development of those deliverables was exercised.</p> <p><i>A physical configuration audit verifies that all intended key deliverables are baselined as configuration items. A functional configuration audit demonstrates that configuration items in the baseline can be traced backward in time to their requirements. All baselined deliverables should be identified in the project's Configuration Management Plan.</i></p>	Audited Baseline	<p><i>PJM-MH, Chapter 6</i> <i>PJM-PTR, pp.5-31 to 5-33</i> <i>PJM-DR, pp. 5-19 to 5-20 and App A</i></p>

### Design Phase Deliverables

The table below is offered as an illustration of how the PM might track the completion, approval and delivery of design phase deliverables.

Final deliverable packages should include a cover memo or form that provides a vehicle for recording all required reviews and approvals.

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Design Phase Deliverables				
ID #	Deliverables	Delivery Date	Date Approved by Customer	Status
	<b>Technical Architecture</b>			
TA.120	Determine Performance Issues			
TA.130	✳ Create Capacity Plan			
	<b>Database Design and Build</b>			
DB.010	✳ Create Logical Database Design			
DB.020	✳ Create Index Design			
DB.030	Create Database Object Authorization Scheme			
	<b>Module Design and Build</b>			
MD.010	✳ Define Design Standards			
MD.030	✳ Design Application			
MD.040	✳ Create Module Functional Documentation			
MD.050	✳ Create Module Technical Documentation			
MD.060	Create Menu Structure			
MD.070	Design Audit Facilities			
	<b>Data Conversion</b>			
CV.040	Design Data Conversion Modules			
	<b>Documentation</b>			
DO.040	Create Documentation Procedures and Environment			
DO.050	Produce Documentation Prototypes and Templates			
DO.060	Produce Initial User Reference			
DO.070	Produce Initial User Guide <sup>1</sup>			
DO.080	Produce High-level Technical Reference			
DO.090	Produce Initial System Operations Guide			
	<b>Testing</b>			
TE.020	Develop System Process Test Model			
TE.030	Develop Module and Module Integration Test Plan			
	<b>Training</b>			
TR.030	Create Initial Training Materials			

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Design Phase Deliverables				
ID #	Deliverables	Delivery Date	Date Approved by Customer	Status
	<b>Transition</b>			
TS.020	⚙ Define Cut-over Strategy			

<sup>1</sup> Note: Phase key deliverable, but not a process key deliverable. The *Final User Guide* is the process key deliverable.

### Potential Pitfalls

The most likely areas of risk during Phase Completion are the following:

- The phase acceptance procedure is not clearly communicated in the project Quality Plan.
- Client satisfaction concerns are not identified and addressed prior to requesting sign-off of deliverables.
- Outstanding issues and problems which affect phase deliverables are not resolved prior to their acceptance.
- Not adhering to the Software Quality Assurance Plan or the Configuration Management Plan.

### Key Words And Phrases

Attribute	The information held about an entity
Entity	Something about which information is retained; e.g. customer, employee, product, etc.
Event	A trigger to which one or more business functions respond; e.g. a license application
Function	A major work unit of an organization; e.g. sales, maintenance, etc.
Model	Diagram or graphical depiction of a system
Physical Configuration Audit	An audit or review that verifies that all intended key deliverables are baselined as configuration items
Process	A series of tasks which result in one or more critical deliverables
Program	A group of projects managed in a coordinated way
Project	Involves work that is <i>finite</i> and <i>unique</i> (as opposed to operations, which involve <i>ongoing</i> and <i>repetitive</i> work)
SP/CB	Strategic Planning and Control Branch
SQAA	Software Quality Assurance Analyst
Step	Smaller units of tasks and sub-processes which produce components of deliverables
Sub-process	Continuously or frequently executed set of actions which produces a defined set of outputs or results
Task	A unit of work that results in a single deliverable